

BEACON HR/Payroll Organizational Risk and Readiness Assessment

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Organizational Risk Assessment Approach

Objectives of an Organizational Risk Assessment

- What is the purpose of an Organizational Risk Assessment?
 - Summarizes key organizational success and risk factors, lessons learned and communication considerations that must be addressed for the project to move forward effectively;
 - Provides a baseline for future assessments; and
 - Recommends specific actions that BEACON HR/Payroll Project Management Office, Change Management Oversight Committee, Standardization Advisory Committee, Agency Leaders and BEACON Support Team Sponsors/Leads should take as part of a high-level Change Leadership Strategy.
- Why conduct an Organizational Risk Assessment?
 - Acts on fact-based analysis rather than hearsay;
 - Identifies areas of resistance to the BEACON HR/Payroll Project;
 - Mitigates risk and increases the probability of a speedy and successful implementation; and
 - Incorporates results into the change management and training plans.

Objectives of an Organizational Risk Assessment (Cont'd)

- Who is our target audience for the Organizational Risk Assessment?
 - BEACON HR/Payroll Program Management Office (PMO);
 - BEACON HR/Payroll Program Steering Committee (PSC);
 - BEACON HR/Payroll Project Change Management Oversight Committee (CMOC);
 - BEACON HR/Payroll Project Standardization Advisory Committee (SAC);
 - Agency Leadership; and
 - BST Sponsors and Leads.

Organizational Risk Factors

The assessment focuses on six areas of organizational risk as it relates to the BEACON HR/Payroll Project:

- **Vision & Value Proposition**: How clear and strong is the “why” and the “what” for the BEACON HR/Payroll Project?
- **Leadership Support**: How much management support exists for the BEACON HR/Payroll Project?
- **Infrastructure & Job Impacts**: Are the North Carolina State agencies and universities prepared to address issues facing structure and role changes relating to this transformation effort?
- **Competing Initiatives**: To what degree will other projects and initiatives impact the transformation?
- **People Enablement**: How well do stakeholders understand their role in the transformation?
- **Communications**: Is sufficient information being communicated to the agencies and universities effectively?

Organizational Risk Assessment Approach

	Select Participating Stakeholder Groups	Determine Assessment Method	Build Measurement Tools	Conduct Assessments	Compile Results; Implement Action Plan
Actions	<ul style="list-style-type: none"> Select stakeholder groups to participate in organizational risk assessment 	<ul style="list-style-type: none"> Determine appropriate method to collect the information needed to create the organizational risk assessment 	<ul style="list-style-type: none"> Select change dimensions Build assessment tool that links agency feedback to change dimensions Determine tool to document assessment information 	<ul style="list-style-type: none"> Schedule and conduct face-to-face interviews Schedule and conduct focus groups Compile and validate data obtained from interviews and focus group sessions 	<ul style="list-style-type: none"> Identify areas most in need of attention Recommend action steps for addressing identified risks
Results	<div>NC Agency Leadership</div> <div>BEACON Project Team Leads</div> <div>BST Sponsors and Leads</div> <div>BST Subject Matter Experts</div>	<div>Face-to-face interviews</div> <div>Focus Groups</div>	<p>Risk Factors:</p> <ul style="list-style-type: none"> Vision & Value Proposition Leadership Support Infrastructure & Job Impacts Competing Projects People Enablement Communication <p>Tools:</p> <ul style="list-style-type: none"> Interview Guide Focus Group Questions 	<p>Scheduled:</p> <ul style="list-style-type: none"> Report results to BEACON HR/Payroll Program Steering Committee Report results to CMOC <p>Ongoing:</p> <ul style="list-style-type: none"> Provide a framework for BEACON HR/Payroll team members to record observations linked to the six risk factors 	<ul style="list-style-type: none"> Targeted strategic communications Risk Matrix Interview notes Leadership alignment assessments Leadership action plans Action items across all project teams Targeted training programs Action items across all project teams

Leadership Interviews & Focus Group Demographics

- The BEACON HR/Payroll Project Organizational Risk Assessment was conducted through a combination of agency leadership and BEACON HR/Payroll Project Team Lead interviews, as well as BEACON Support Team Member focus group sessions with 201 stakeholders from June – September 2006:



Stakeholder Groups	Data Gathering Mechanism	# of Participants
Agency Leadership	Interviews	13
BEACON Support Team Sponsors and Leads	Focus Groups	114
Agency Subject Matter Experts	Focus Groups	69
BEACON HR/Payroll Project Team Leads	Interviews	5
Total Participants = 201		

- Questions focused on the following: vision for success, risk factors, lessons learned from past projects, other competing agency activities, and communication strategies/mechanisms.
- The BEACON HR/Payroll Project Change Management Team analyzed responses and developed an Organizational Risk Assessment that specifies organizational risk themes and suggested recommendations for successful implementation.

Key Findings & Recommendations

Risk Matrix

- A Risk Matrix was created to graphically represent the findings gathered from our organizational risks assessment interviews and focus group sessions.
- The Risk Matrix is organized around the identified risk factors which were articulated by agency leadership and BEACON HR/Payroll Project Team Leads, as well as BEACON Support Team (BST) Sponsors, Leads and Subject Matter Experts.
- The combination of interview and focus group information is used to show the levels of risk for the relevant audience groups.
- The capacity for change is reported on the Risk Matrix using the following codes:

Color-Coding	Risk Level
	Low level of risk; minimal area of concern.
	Medium level of risk; area of potential concern.
	High level of risk; major area of concern.

Risk Matrix of Key Findings

The Risk Matrix indicates some key differences between BST Member, BEACON Project Team Sponsors and Leads, and agency leadership in the areas of infrastructure and job impacts, people enablement, leadership support and communication.

Risk Factors/Stakeholder Group	Agency Leadership	BST Sponsors & Leads	BST Subject Matter Experts	BEACON Project Team Leads
Vision & Value Proposition	G	G	Y	Y
Leadership Support	Y	R	R	R
Infrastructure & Job Impacts	Y	R	R	R
Competing Initiatives	G	G	G	Y
People Enablement	Y	R	R	R
Communication	Y	R	R	R



High level of risk,
major area of concern.



Medium level of risk,
area of potential concern.



Low level of risk;
minimal area of concern.

Key Findings: Vision & Value Proposition -

G

Key Perceptions:

- State leadership has a high level of understanding of the BEACON HR/Payroll Project because of the active part they and their direct reports played in the Joint Application Design Sessions, Program Steering Committee and BST meetings.
- Benefits of the BEACON HR/Payroll Project identified by state organizations include a single system of record, flexibility of use, data integrity, cross functionality integration, reduced inefficiencies, accurate global reporting and compliance.
- Past state projects have often been seen as “Raleigh” initiatives and lacked local/regional buy-in and support.

Comments:

- “The BEACON HR/Payroll system will save us money by eliminating processes that are duplicative in nature.”
- “We currently waste a lot of time conducting activities that are redundant.”
- “Many state employees complain about the disparate systems they have to use now...especially PMIS. They assume that the BEACON HR/Payroll system will effectively replace PMIS.”

Recommendations:

- Continue to reinforce the rationale and operational benefits for why the State needs the BEACON HR/Payroll system, and explain consequences and costs of inaction ("do-nothing scenario") in communications that go out to stakeholders.

Key Findings: Competing Activities -

G

Key Perceptions:

- Some competing initiatives within state organizations were identified. These initiatives are being tracked so the BEACON HR/Payroll Project Team can coordinate activities with these agency initiatives to ensure that conflicts do not arise.
- There are certain periods during the year that are difficult for some state organizations to participate in BEACON HR/Payroll development activities. Such yearly activities include end of fiscal year closeouts, legislative session work and tax season.

Comments:

- "Balance the BEACON Project workload for agencies with their own day-to-day workload requirements."
- "Be aware of a shortage of personnel to help out with the BEACON HR/Payroll Project due to concurrent projects within their own agencies and universities."
- "We have other projects within our own agencies that take up a lot of our time. How do we prioritize our time to meet these multiple needs?"

Recommendations:

- Continue to track competing state initiatives so that the BEACON HR/Payroll Project Team can continue to coordinate activities with these initiatives to ensure that conflicts do not arise.
- Work with agency and university leaders to obtain the number of resources needed to address BEACON HR/Payroll Project requirements.

Key Findings: Leadership Support -

R

Key Perceptions:

- Agency leadership support for the BEACON HR/Payroll Project varies by state organization; leadership support is higher in larger organizations and lower in smaller organizations.
- Agency leaders have not played an active role in communicating about the BEACON HR/Payroll Project to their employees.
- The BEACON HR/Payroll Project is large in scale and involves numerous state organizations that will be affected by system and process changes; visible leadership support is needed to address fears pertaining to identified job role changes.

Comments:

- "Leadership needs to support the project and help get the resources needed to make the BEACON HR/Payroll Project a success."
- "Make sure agency leadership is involved with the project; they need to support the changes that are going to take place."
- "Lack of support from agency leadership will hurt the project – you need to help them understand the importance of this initiative."

Recommendations:

- Develop a leadership strategy to build agreement among the State's top leadership teams on critical aspects of the BEACON HR/Payroll Project's major challenges to be addressed.
- Construct leadership action plans for selected agency leaders and HR directors who are expected to play a critical role in implementing the BEACON HR/Payroll Project.

Key Findings: Infrastructure & Job Impacts -

R

Key Perceptions:

- State HR and payroll employees are unclear how their job roles will change as a result of the BEACON HR/Payroll Project. Some state employees may face major changes in their job roles due to automation and reclassification of responsibilities.
- State HR and payroll employees are concerned that the BEACON HR/Payroll system and process changes will take away agency control over various functions and jobs.
- State HR and payroll employees are worried that there will be a loss of jobs due to more standardized, integrated and automated job functions across state organizational boundaries (i.e., shared services).

Comments:

- "The new system needs to eliminate the duplication of efforts by various people. The current systems wastes valuable resource time."
- "Make sure you develop standardized policies and procedures for HR and Payroll functions that can be followed consistently across all agencies."
- "We need to eliminate duplicate efforts by our staff. No more filling out all the paper work all over again. No double entry."

Recommendations:

- Document job roles, responsibilities, knowledge, skills and abilities needed for each BEACON HR/Payroll system related position.
- Redesigning or designing new jobs to enable state employees to achieve successful job performance in the new BEACON HR/Payroll environment.

Key Findings: People Enablement -

R

Key Perceptions:

- A lot of clerical level state HR and payroll employees are going to be transitioned into new BEACON HR/Payroll related job roles and they are concerned that adequate training support will not be provided.
- In past state technology change initiatives training has been inadequate. It was not job specific or relevant to employees daily work activities.
- State employees want to make sure that BEACON HR/Payroll go-live support staff understands their business role and functions so they can better address any technical and process related questions concerning the use of the BEACON HR/Payroll system.

Comments:

- "If you don't invest in training that corresponds with our daily work, people will have a hard time learning the new system and won't accept it."
- "Training should clearly show new roles and responsibilities in the BEACON HR/Payroll system. It should cover the various processes as well as what people should do in these situations."
- "Do not offer insufficient training, such as training that is too cookie-cutter. Make sure that training is relevant to what we do on a daily basis."

Recommendations:

- Develop a role-based training curriculum and plan to train state employees on what they need to know and do to carry out their job roles in the new BEACON HR/Payroll environment.
- Use new BEACON HR/Payroll related business processes and procedures as the drivers for creating course materials for end-users.

Key Findings: Communication -

R

Key Perceptions:

- Numerous communications about the BEACON HR/Payroll Project have been sent to state leadership. State employees have not been kept abreast of the project's progress and benefits/opportunities it will provide them.
- State lacks central communication vehicles (e.g., email systems, newsletters) to enable cascading of BEACON HR/Payroll Project communications to its employees.
- The BEACON HR/Payroll Project Team has focused its communications on the BST Sponsors and Leads and not to the Communications Agents. Thus, there has been no real efforts within state organizations to communicate project information out to their employees.

Comments:

- "Agency employees have a limited understanding of the BEACON HR/Payroll Project. Most communications about the project to date have been to agency leaders."
- "You need to start talking about the benefits of the BEACON HR/Payroll system. Otherwise, people will form their own opinions...which are usually negative."
- "Agency staff do not know much about the BEACON HR/Payroll Project and how it fits into the overall statewide business transformation effort."

Recommendations:

- Provide BEACON Support Teams with communication toolkits that contain relevant information to be used for awareness building/meetings within state organizations.
- Utilize the BEACON HR/Payroll website to make project information available to general state employees and establish password enabled links to provide project information to BEACON Support Teams.
- Empower agencies to take ownership of communications via BST Leads and Communications Agents.

Next Steps

Participants Provided a Wealth of Good Advice!

"Increase face-to-face communications."

*"Leveraging champions in the agencies
will be the key to gaining employee
support."*

"Manage expectations."

*"Show top down
support for new
BEACON HR &
Payroll business
operations."*

*"Communicate, communicate,
communicate."*

*"Develop a concrete
operational vision."*

*"Facilitate agency organizational and job
changes."*

"Make decisions in a timely manner."

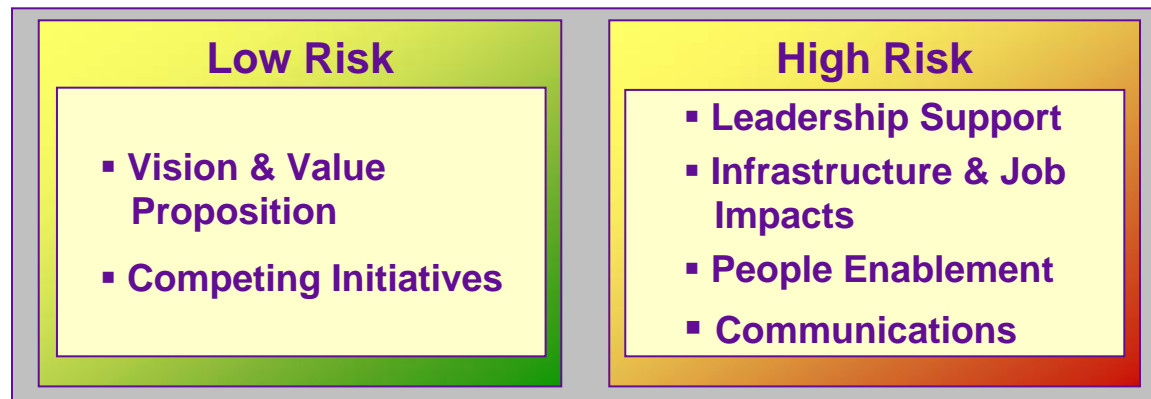
*"Train employees on new
processes and systems
functionality."*

*"What gets measured, gets
done."*

***Our challenge was to identify the critical
change management actions required to
reduce BEACON HR/Payroll Project
implementation risks.***

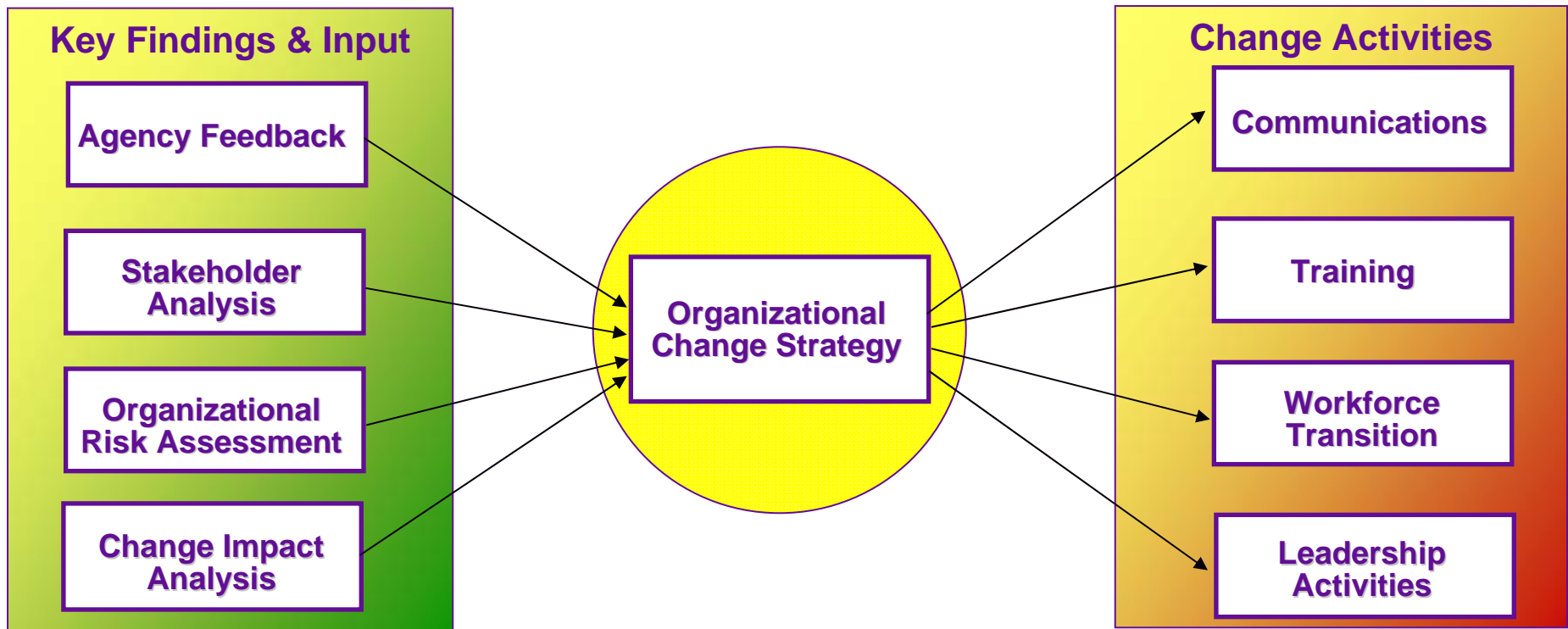
Address High Risk Areas

- From the agency leadership and BEACON HR/Payroll Project Team Lead interviews, as well as the BST Member focus group sessions, the BEACON HR/Payroll Project Change/Communications Team has been able to determine which risk categories are of high risk and which of those are of low risk.
- Within those categories of low risk, the BEACON HR/Payroll Project Change/Communications Team will continue to employ the current change management approach, while also incorporating some of the recommendations listed on the following pages.
- Within those categories of high risk, the BEACON HR/Payroll Project Change/Communications Team will focus on moving those categories into a lower risk rating.



Upcoming Change Management Activities

Based on the feedback we collect from agencies, the BEACON HR/Payroll Project Team will develop a organizational change strategy that provides the basis to plan and prepare everyone for the new system and process changes.



Next Steps: Leadership Support

- **Review Organizational Risk and Readiness Assessment with BEACON HR/Payroll Project leadership groups.**
 - Build agreement among state leadership teams on critical aspects of project and major challenges to be addressed.
 - Confirm leadership requirements needed to increase probability of successful implementation.
- **Develop Leadership Action Plans for involving agency leaders in BEACON HR/Payroll Project change management and communication activities.**
 - Meet with Program Steering Committee (PSC), Change Management Oversight Committee (CMOC), Program Management Office, state agency leaders, agency HR Directors and BEACON Support Team (BST) Sponsors to develop action plans.
 - Monitor results and coach individual leaders as requested.
- **Update BEACON HR/Payroll Project Communications Plan and clarify BST communication roles and expectations.**
 - Update communication core messages for BEACON HR/Payroll Project stakeholders to address their concerns during each phase of the project.
 - Update Communications Plan to leverage existing state communication vehicles, both formal and informal, to the maximum extent possible.
 - Communicate expectation that BST Leads and Communication Agents will take an active and visible role in sharing project updates and key messages within their organizations.

Next Steps: Leadership Support (Cont'd)

Leadership action plans will help state agency and university leaders understand the unique actions needed to support the BEACON HR/Payroll Project implementation. It will also help leaders enhance change management insights and skills that are transferable to their ongoing leadership roles:

Owner	Action Steps
Agency/University Leadership (includes PSC, CMOC, SAC, BST Sponsors & agency HR Directors)	<ul style="list-style-type: none"> •Meet with BEACON HR/Payroll Change Management Team to review and revise action plans as needed. •Build agreement among leaders on critical aspects of the BEACON HR/Payroll Project and major challenges to be addressed. •Confirm leadership strategy recommendations needed to increase probability of successful implementation. •Show visible implementation support for BEACON HR/Payroll system and process changes within their organizations; convey importance of BEACON HR/Payroll Project to employees.
BEACON HR/Payroll Change Management Team	<ul style="list-style-type: none"> •Develop draft of leadership action plan. •Meet with agency and university leaders to review and revise action plans as needed. •Monitor results and coach leaders as requested.

Next Steps: Organizational Infrastructure & Jobs

- BEACON HR/Payroll Project will address concerns pertaining to organizational infrastructure and jobs by conducting workforce transition activities that focus on answering the following types of questions:
 - What jobs will be impacted the most by BEACON HR/Payroll related changes and in which agencies?
 - Will new skills will be needed as a result of BEACON HR/Payroll changes?
 - Will new jobs be needed as a result of BEACON HR/Payroll changes?
 - Will some jobs be redundant as a result of BEACON HR/Payroll changes?
 - What organizational changes will be required to implement new BEACON HR/Payroll related process changes?
 - Will any HR policies and programs need to be modified as a result of BEACON HR/Payroll changes?
 - How do we communicate all of the BEACON HR/Payroll related job, skill and organizational changes to agency managers and employees?
 - How do we make sure that employees understand BEACON HR/Payroll job, process and organization changes?
 - What kind of training do we need? How will we deliver training?

Next Steps: Organizational Infrastructure & Jobs (Cont'd)

Agency leadership must determine the BEACON HR/Payroll Project's impact to their organization's infrastructure and jobs, and plan their activities accordingly. However, many other stakeholders are also involved with this effort:

Owner	Action Steps
BEACON HR/Payroll Project Change Management Team	<ul style="list-style-type: none"> • Identify process and organizational differences between state organizations with help from BST Workforce Transition/Change Agents. • Provide agency leadership with action plans to institute and enforce change efforts within their organizations. • Work with BST Workforce Transition/Change Agents to coordinate and execute state employee job role mapping to SAP user roles within state organizations. • Work with BST Workforce Transition/Change Agents to coordinate and conduct state employee job impact assessments that examine current HR/Payroll jobs to determine the degree of impact BEACON HR/Payroll solutions will have on existing job roles and responsibilities within state organizations. • Work with BST Workforce Transition/Change Agents to validate and/or update current HR/Payroll job descriptions to reflect new BEACON HR/Payroll work requirements within state organizations. • Work with BST Workforce Transition/Change Agents to develop a workforce transition strategy and plan that can be used by the PSC, CMOC and BST Sponsors/Leads to coordinate the transition of state employees into BEACON HR/Payroll positions and organizations (shared services).

Next Steps: Organizational Infrastructure & Jobs (Cont'd)

Owner	Action Steps
Program Steering Committee (PSC)	<ul style="list-style-type: none"> • Approve recommended process standardization changes, organizational and job role changes, and changes/additions to existing policies. • Make final decisions concerning highest level of escalation for project issues resolution and proposed scope changes. • Convey importance of BEACON HR/Payroll Project and its process change decisions to agency and university leadership. • Provide direction to agencies and universities consistent with BEACON HR/Payroll Project goals.
Change Management Oversight Committee (CMOC)	<ul style="list-style-type: none"> • Set direction for the BEACON HR/Payroll Project change management/workforce transition approach with agencies and universities. • Make recommendations to PSC regarding change management issues. • Determine how to communicate PSC approved process changes within agencies and universities, and help determine organizational change impacts. • Determine whether agencies and universities are able and willing to adopt the proposed process changes.

Next Steps: Organizational Infrastructure & Jobs (Cont'd)

Owner	Action Steps
Standardization Advisory Committee (SAC)	<ul style="list-style-type: none"> •Leverage best practices to standardize and streamline business policies and processes to maximize benefits for state agencies and universities. •Analyze options to standardize and/or streamline disparate processes and seek clarification of existing policies to support a consolidated way of conducting business throughout the State.
Agency/University Leadership	<ul style="list-style-type: none"> •Show visible implementation support of BEACON HR/Payroll system within their organizations; convey importance of BEACON HR/Payroll Project to employees. •Commit necessary resources to BEACON HR/Payroll Project as needed. •Resolve issues concerning BEACON HR/Payroll Project within their organizations.
BST Change/Workforce Transition Agents	<ul style="list-style-type: none"> •Work with BEACON HR/Payroll Project Team to conduct a workforce impact analysis within their respective agencies/universities. •Work with BEACON HR/Payroll Project Change Management Team to plan for the transition of their workforce into new job roles. •Identify specific policies and procedures that may need to be modified within their organization to complete workforce transition activities.

Next Steps: People Enablement

- BEACON HR/Payroll Project Team's people enablement objective is to:
 - Promote understanding of the new SAP software solution;
 - Facilitate development of training solutions that address the immediate and ongoing training needs of BEACON HR/Payroll stakeholders;
 - Promote the acquisition of knowledge and skills needed to perform successfully in new BEACON HR/Payroll job roles;
 - Prepare state employees for changes resulting from the BEACON HR/Payroll Project implementation; and
 - Build confidence and trust among BEACON HR/Payroll end user populations during in the project's implementation.
- A role-based training plan and curriculum will be developed by:
 - Determining the number of persons to train by job role/position;
 - Identifying courses that are needed by job role/position;
 - Identifying the number of course sessions; and
 - Identifying state organizations training room needs.

Next Steps: People Enablement (Cont'd)

The following stakeholders play a valuable role in developing and implementing training specific to North Carolina state agency and university needs:

Owner	Action Steps
BEACON Project Change/Communications Team Lead	<ul style="list-style-type: none"> •Provides guidance for training strategy and approach. •Supervises procurement process for training vendors. •Ensures quality of BEACON HR/Payroll training program. •Responsible for overall end user training results.
BST Training Agent	<ul style="list-style-type: none"> •Coordinates training activities with BEACON HR/Payroll Project Training and Change/Communications Teams, as well as BST SMEs. •Ensures state employees get scheduled and have access for training. •Assists in securing space, furniture and hardware; reproduce paper-based training. •Coordinates training classroom preparation prior to training sessions. •Collects and summarizes course evaluations; provides improvement suggestions. •Reports training progress to BST Lead and BEACON Project Training Lead.

Next Steps: People Enablement (Cont'd)

Owner	Action Steps
BEACON Project Training Team Lead	<ul style="list-style-type: none"> •Serves as point of contact between Consultant Training Team and North Carolina ITS. •Manages overall end user training effort. •Coordinates creation of technical training environment. •Oversees development of Learning Management System tool. •Identifies and coordinates training of BEACON trainers to deliver training courses. •Reviews and approves training content. •Reviews course evaluations and develops final evaluation report. •Coordinates functional team support for development and review of course materials.
Agency/University Project Training Registration Manager	<ul style="list-style-type: none"> •Designs and develop detailed registration strategy. •Coordinates through the agency/university: <ul style="list-style-type: none"> –Identification of training participants; –Registration for applicable courses; –Scheduling of rooms, trainers and equipment; –Printing of materials and distribution; and –Evaluation of effectiveness of training courses. •Manages the Learning Management System tool.

Next Steps: People Enablement (Cont'd)

Owner	Action Steps
Training Development Lead	<ul style="list-style-type: none"> •Leads the strategy, design, development and testing of course materials. •Develops and monitors a detailed training task plan. •Designs and develop training materials (as required). •Tests and revises training materials via a quality review process. •Designs and develops training curriculum and development templates.
Course Developers	<ul style="list-style-type: none"> •Design and develop training materials: <ul style="list-style-type: none"> – Training Courses; – Exercise Guides; – Work Instructions; – Job Aids; – Data Sheets; and – Evaluation Tools. •Test and revise training materials via a quality review process. •Participate in training BEACON trainers by facilitating a training class.
OSP North Carolina Central Training	<ul style="list-style-type: none"> •Participates in strategy development. •Reviews content when appropriate. •Provides guidance to ensure consistency with North Carolina standards. •Assists with delivery.

Next Steps: People Enablement (Cont'd)

Owner	Action Steps
BST Communication Agent	<ul style="list-style-type: none"> • Leads and coordinates within state organizations: <ul style="list-style-type: none"> – Communicates information on training approach, logistics and requirements; and – Communicates high-level training messages to course target audiences.
BST Subject Matter Experts/Trainers	<ul style="list-style-type: none"> • Support course development. • Review training content. • Create data sheets and validate exercises. • Attend train-the-trainer sessions, as needed. • Deliver instructor-led training, as needed. • Provide post-training support, as needed.
BEACON Project Functional Team Members	<ul style="list-style-type: none"> • Support development of training materials by communicating and/or documenting system functionality and new business processes. • Support training delivery by timely answering class parking lot questions and FAQs. • Support exercise development by providing sample data for business scenarios.
BEACON Project IT Team Members	<ul style="list-style-type: none"> • Set up training environment. • Refresh training environment. • Support training environment during training development and delivery sessions.

Next Steps: Communications

It is imperative to communicate effectively to state organizations about the BEACON HR/Payroll Project.

To do so, the BEACON HR/Payroll Project Change/Communications Team will develop a Communications Plan that targets the specific needs of the following audiences:

- Project Leadership (PSC, CMOC, SAC);
- Agency Leadership (Secretaries, Deputy Secretaries, CFOs & CIOs);
- University President, Chancellors and Vice Chancellors;
- Agency and University Core Users (HR/Payroll);
- Agency and University State Employees (Employee/Manager Self Service);
- BEACON Support Team Sponsors, Leads, and Agents; and
- Agency and University Subject Matter Experts.

Note: Please refer to the BEACON HR/Payroll Project Stakeholder Analysis for a comprehensive assessment of the audiences identified above, as well as a listing of additional groups that may have an impact or are impacted by the project.

Next Steps: Communications (Cont'd)

The following stakeholders play a valuable role in creating and communicating information pertaining to the BEACON HR/Payroll Project to various audiences:

Owner	Action Steps
BST Sponsors	<ul style="list-style-type: none"> •Support and monitor communication activities within their agencies/universities and provide assistance when necessary: <ul style="list-style-type: none"> – Identify communications opportunities and schedule BEACON Project updates as agenda items; – Encourage BST Leads and Communications Agents to communicate to agency/university employees; – Communicate BEACON HR/Payroll Project information to agency/university leadership; – Encourage agency/university leadership to deliver key BEACON HR/Payroll Project information to employees. •Identify communications issues and risks (including number of resources available).
BST Leads	<ul style="list-style-type: none"> •Maintain an active and visible role in communicating BEACON HR/Payroll information and promotional materials within their respective agencies/universities. •Communicate issues and status to agency/university leaders and BST Sponsors as needed. •Support BST Communications Agents in planning and conducting targeted BEACON HR/Payroll Project awareness and progress meetings with agency/university staff.

Next Steps: Communications (Cont'd)

Owner	Action Steps
Agency/University Leadership	<ul style="list-style-type: none"> •Communicate BEACON HR/Payroll Project importance and leadership commitment to state managers and employees.
BST Communication Agents	<ul style="list-style-type: none"> •Plan and conduct targeted BEACON HR/Payroll Project awareness and progress meetings with agency/university staff on a monthly basis (more often if needed). •Identify key agency/university meetings and request time on meeting agenda. •Create generic or customized communications materials for agencies/universities as needed. •Track communication issues within agencies/universities and contact BEACON HR/Payroll Communications Team to address items.
BST Subject Matter Experts	<ul style="list-style-type: none"> •Communicate BEACON HR/Payroll information and promotional materials within agency/university HR and Payroll divisions. •Identify communication issues and needs within their respective HR/Payroll areas.
BEACON HR/Payroll Project Change Management Team	<ul style="list-style-type: none"> •Equip BST Leads and Communication Agents with BEACON Project communication materials and support agencies in delivering key messages: <ul style="list-style-type: none"> –Monthly Communications Toolkit with updated timeline of activities; –Custom communications for newsletters, agency/university meetings, etc. •Provide timely website updates and password enabled links to BST presentation materials and workshop documentation.

Appendix A: Agency Leadership Interviews

Agency Leaders Interviewed

- Mark Foster – Chief Fiscal Officer, Department of Transportation
- Dempsey Benton – Chief Deputy Secretary, Department of Environment & Natural Resources
- Bill Willis – Deputy Chief Information Officer, Information Technology Services
- Allyn Guffey – Assistant Secretary for Finance & Business Operations, Department of Health & Human Services
- Philip Price – Chief Financial Officer & Associate State Superintendent, Department of Public Instruction
- Dan Stieneke – Chief Deputy Secretary, Department of Corrections
- Staci Meyer – Chief Deputy Secretary, Department of Cultural Resources
- Randy Barnes – Assistant Secretary, Department of Revenue
- Bill Golden – Chief Information Officer, North Carolina Department of State Treasurer
- William Dudley – Chief Deputy Secretary, Department of Crime Control and Public Safety
- Kristi Hyman – Chief of Staff, Department of Justice
- Gwen Canady – Deputy State Controller, Office of State Controller
- John Baldwin – Chief of Staff, Department of Labor



Agency Leadership Interview Questions

- How will the implementation of the BEACON HR/Payroll system benefit your organization? In other words, what is your vision of success for the BEACON HR/Payroll Project?
- What do you see as the biggest potential risks to the BEACON HR/Payroll Project? What are the biggest political/people issues that could stand in the way of a successful implementation of the BEACON HR/Payroll system? What suggestions do you have for overcoming these issues?
- Using a scale from 1-10, where one is “To a Small Extent,” and 10 is “To a Great Extent,” to what extent do you think the employees within your agency understand the need for the BEACON HR/Payroll Project?
- If you were in charge of the project, what are the top 3-5 things you would do to ensure success for the project?
- If roles and responsibilities change for impacted users within your organization, are there any policies that you know of that will need to be modified?
- Please share with us what information you are requested to report on at the statewide level as it pertains to HR/Payroll data. More specifically, are there certain indicators that are more important to have that you cannot provide today?

Agency Leadership Interview Questions (Cont'd)

- What are some of the important lessons learned from past business transformation efforts within your organization?
- Are there other initiatives within your organization that may impact the BEACON HR/Payroll Project?
- What messages do you think the BEACON HR/Payroll Project Team should be communicating to the agencies?
- What is the most effective way to communicate about the BEACON HR/Payroll Project with your entire organization (e.g., newsletters, emails, management briefings, informal small gatherings, focus groups)?
- The next two questions will enable us to understand the agency's organizational readiness to implement the BEACON HR/Payroll system. We would like to ask the following questions to get your feedback and suggestions for improvement:
 - Decision-making: How does your organization make decisions when problems emerge during change?
 - Coordination: How well do leaders in your organization work as a team to coordinate activities during change?

Appendix B: BST Sponsor and Lead Focus Groups

Agency BST Sponsor Focus Group Participants

- David Smith – Dept. of Agriculture
- Rex Whaley – Administrative Office of the Courts
- Bennie Aiken – Dept. of Crime Control & Public Safety
- Kennon Briggs – NC Community College System
- Alice Smith – NC Community College System
- Rick Stone – Dept. of Cultural Resources
- Denise Sessoms – Dept. of Commerce
- Tracy Little – Dept. of Corrections
- Rod Davis – Dept. of Environ. & Natural Resources
- Allyn Guffey – Dept. of Health & Human Services
- Bruce Garner – Dept. of Secretary of State
- Lorrie Dollar – State Auditor's Office
- Philip Price – Dept. of Public Instruction
- Janice Davis – Dept. of Public Instruction
- Cecilia Edgar – Wildlife Resources Commission
- Larry Dix – Dept. of Juvenile Justice
- Marshall Barnes – Fiscal Research
- George Bakolia – Office of Info. Technology Services
- Trisch Amend – NC Housing Finance Administration
- Jim Newman – Dept. of Insurance
- Becky Brown – Dept. of Labor
- Margaret Bode – NC Education Lottery
- Camille Winston – Office of Administrative Hearings
- Jonathan Womer – Office of State Budget & Mgmt.
- Keith McCombs – Dept. of Revenue
- Amy Bowman – Dept. of State Treasurer
- Pam Wortham – Dept. of State Treasurer
- Mark Foster – Dept. of Transportation
- Steve Ghabel – Dept. of Transportation
- Dusty Wall – Office of State Personnel
- Linda Mathis – State Board of Elections
- Beverly Harris – State Health Plan
- Kristy Hyman – Dept. of Justice
- Ginger Linnis – Dept. of Justice
- McKinley Wooten – Dept. of Administration
- Anne Lasley – Employment Security Commission of NC
- Gwen Canady – Office of State Controller

University BST Sponsor Focus Group Participants

- Kathy Wong – Western Carolina University
- Linda Beja – Western Carolina University
- Gayle Davis – UNC General Administration
- Laura Young – UNC General Administration
- Ginnie Evans – UNC General Administration
- Donnie Tenney – Eastern Carolina University
- Matilda Pate – East Carolina University
- Rick Presnell – Appalachian State University
- Kay Wood – Appalachian State University
- Richard Shook – Appalachian State University
- Gary Penrod – Fayetteville State University
- David Beach – Fayetteville State University
- Gary Penrod – Fayetteville State University
- Joella Anderson – UNC Greensboro
- Lydia Gossett – UNC Asheville
- Mary Carol Morrison – UNC Asheville
- Jolene Elkins – UNC Asheville
- Laurie Charest – UNC Chapel Hill
- Sabrena McDonald – Fayetteville State University
- Alfreda Chance – Fayetteville State University
- Pamela Barkett – UNC Pembroke
- JoAnn McDowell – UNC Wilmington
- Dale Lockwood – UNC Wilmington
- Earla Burren – NC School of the Arts
- Debra Gunter – NC School of the Arts
- Connie Boyce – NC School of Science & Math
- Frank Toliver – NC School of Science & Math
- Daphine McMichael – NC Central University
- Yolanda Banks-Deaver – NC Central University
- JoWanna Mosley – NC Central University
- Frank Senter – NC State University
- Brian Simet – NC State University
- Vanessa Lawson – NC AT&T State University
- Margaret Stancil – NC AT&T State University
- Deborah Parker – Winston-Salem State University
- Jean Moore Sims – Elizabeth State University
- Jennie Hill – UNC Charlotte

Agency BST Lead Focus Group Participants

- John Stephenson – Dept. of Agriculture
- Margaret Wiggins – Administrative Office of the Courts
- Marvin Mervin – Administrative Office of the Courts
- Stephanie Brown – Dept. of Crime Control & Public Safety
- Thurman Turner – Dept. of Crime Control & Public Safety
- Shawnda Brown – Dept. of Crime Control & Public Safety
- Kennon Briggs – NC Community College System
- Debra Lassiter – Office of Info. Technology Services
- Tami Hicks – Office of Info. Technology Services
- Becky Brown – Dept. of Labor
- Elsie Underhill – Office of Administrative Hearings
- Ursula Hairston – Office of State Budget & Mgmt.
- Van Lindley – Dept. of Revenue
- Peter Goolsby – Dept. of Secretary of State
- James Forte – State Auditor's Office
- Rhonda Langston – Dept. of State Treasurer
- Angela Faulk – Dept. of Transportation
- Randy Keel – Dept. of Transportation
- Cora Bright – Dept. of Transportation
- Valerie Ford – Dept. of Administration
- Jim Newman - Dept. of Insurance
- Larry McLamb – Dept. of Public Instruction
- George Fenton – Dept. of Cultural Resources
- Chet Mottershead – Dept. of Commerce
- Jim Knight – NC Education Lottery
- Byron Harris – Dept. of Corrections
- Rod Davis – Dept. of Environ. & Natural Resources
- Deborah Barnes – Dept. of Health & Human Services
- Deanna Perry - Dept. of Health & Human Services
- Jodi Bone – Employment Security Commission of NC
- Diane Kiel – NC Housing Finance Administration
- Tommy Clark – Wildlife Resources Commission
- Carol Batker – Wildlife Resources Commission
- Marshall Barnes – Fiscal Research
- Linda Mathis – State Board of Elections
- Alan Sanders – Dept. of Justice
- Dusty Wall – Office of State Personnel
- Julie Batchelor – Office of State Controller
- Cassandra Cofield – Dept. of Juvenile Justice
- Gwen Tann – State Health Plan

BST Sponsor & Lead Focus Group Questions

- What are the key factors that will make the BEACON HR/Payroll Project a success within your agency or university?
- What do you see as the biggest potential risks to the BEACON HR/Payroll Project?
- What are some of the important lessons learned from past business transformation efforts within your agency or university?
- Are there other initiatives within your agency or university that may impact the BEACON HR/Payroll Project?
- What is the most effective way to communicate about the BEACON HR/Payroll Project within your agency or university?

Appendix C: Agency SME Focus Groups

Design Session SME Focus Group Participants

Deductions

- Anna Bass – Dept. of Health & Human Services
- Candace Rhodes – Dept. of Agriculture
- Carol Stephenson – Office of State Controller
- Doris Martin – Department of Corrections
- Edith Cannady – Office of State Controller
- Gloria Lennon – Administrative Office of the Courts
- Joyce Blackmon – Office of State Controller
- Kim Battle – Dept. of State Treasurer
- Lou Kost – Office of State Personnel
- Paty Benard – Office of State Controller
- Peggy Oliver – Office of State Personnel
- Phyllis Creech – Dept. of Agriculture
- Randy Keel – Dept. of Transportation
- Tammie Hicks – Dept. of Insurance
- Tammy Wood – Office of State Controller
- Vivian Stanley – Office of State Controller

FI Organizational Structure

- Agness Gunter – Office of State Budget & Mgmt.
- Anne Godwin – Office of State Controller
- Cynthia Vincent – Office of State Controller
- Helen Vozzo – Office of State Controller
- Janet Rust – Dept. of Labor
- Jean Burke – Dept. of Correction
- Jim Macaulay – Office of State Controller
- Joe Wilson – Dept. of Transportation
- John Stephenson – Dept. of Agriculture
- Margaret Kendall – Dept. of Health & Human Services
- Martha Hunt – Office of State Controller
- Nancy Boyer – Dept. of Health & Human Services
- Nancy Thomas – Office of State Controller
- Stephanie King – Dept. of Transportation
- Terri Noblin – Office of State Controller
- Valerie Carter – Office of Info. Technology Services

Design Session SME Focus Group Participants (Cont'd)

Personnel Administration

- Alan Sanders – Dept. of Justice
- Charles Duckett – Office of State Auditor
- Chet Mottershead – Dept. of Commerce
- David Shehdan – Dept. of Secretary of State
- Diane Kiel – NC Housing Finance Administration
- Dusty Wall – Office of State Personnel
- Lynn Floyd – Office of State Personnel
- Marilyn Long – Dept. of Health & Human Services
- Pam Height – Dept. of Revenue
- Patti Brooks – Administrative Office of the Courts
- Paul Marajiko – Dept. of Transportation
- Shari Howard – Office of State Personnel
- Shawanda Brown – Dept. of Crime Ctrl & Public Safety
- Tammy Penny – Dept. of Correction
- Terry Penny – Dept. of Correction
- Winnie Creech – Dept. of Environ. & Natural Resources

Salary Control System Interface

- Agness Gunter – Office of State Budget & Mgmt.
- Ann Anderson – Office of State Controller
- Ann Harris – Dept. of Secretary of State
- Barbara Baker – Dept. of Correction
- Elaine Freeman – Dept. of Crime Ctrl & Public Safety
- Emily Moore – Office of State Budget & Mgmt.
- Kim Padfield – Dept. of Transportation
- Kris Michaloski – Office of State Personnel
- Lynette Colson – Dept. of Transportation
- Nancy Boyer – Dept. of Health & Human Services
- Nancy Thomas – Office of State Controller
- Tami Luckwaldt – Dept. of Insurance
- Terri Noblin – Office of State Controller

Design Session SME Focus Group Participants (Cont'd)

Time Quotas & FMLA

- Anna Bass – Dept. of Health & Human Services
- Ben Harward – Dept. of Agriculture
- Lynette Parrish – Dept. of Transportation
- Marilyn Hucks – Office of State Personnel
- Phyllis Perry – Dept. of Correction
- Randy Keel – Dept. of Transportation
- Rose Hendricks – Dept. of Commerce
- Stephanie Beard – Dept. of State Treasurer

Design Session SME Focus Group Questions

- How will the implementation of the BEACON HR/Payroll Project benefit your organization? In other words, what is your vision of success?
- What do you see as the biggest potential risks and barriers to the successful implementation of the BEACON HR/Payroll Project within your organization?
- If you were in charge of the BEACON HR/Payroll Project, what are the top 3-5 things you would do to overcome potential risks and barriers in order to ensure a successful project implementation?
- How did your organizational leaders make decisions when problems emerge during past business transformation/change projects? Did decisions take forever or were they made quickly?
- How well did the leaders in your organization work as a team to coordinate activities during past business transformation/change efforts?
- What are some of the important lessons learned from past business transformation/change efforts within your organization?
- To what extent do you think the employees in your organization understand the need for the BEACON HR/Payroll Project?
- What is the most effective way to communicate about the BEACON HR/Payroll Project within your organization?

Appendix D: BEACON HR/Payroll Project Team Lead Interviews



BEACON HR/Payroll Project Team Leads Interviewed

- Lowell Magee – Project Manager
- Andrew Koenigsberg – Deputy Project Manager
- Teresa Shingleton – Integration Team Lead
- Anita Ward – Functional Team Lead
- Martin Geres – Technical Infrastructure Team Lead

BEACON HR/Payroll Project Team Lead Interview Questions

- **Vision & Value Proposition:** To what extent do you think state employees understand the BEACON HR/Payroll Project vision and value proposition (i.e., the “why” and “what” for the Project)? Use a scale from 1-5, where 1 = little/no extent and 5 = great extent, to rate this item. Why did you select this rating?
- **Leadership/Sponsorship:** To what extent do you think state leaders support the BEACON HR/Payroll Project (i.e., state executives hold themselves and their direct reports accountable for supporting the required BEACON changes)? Use a scale from 1-5, where 1 = little/no extent and 5 = great extent, to rate this item. Why did you select this rating?
- **Infrastructure & Job Impacts:** To what extent do you think state agencies are prepared to address issues facing structure (i.e., shared services) and job role changes related to the BEACON HR/Payroll transformation effort? Use a scale from 1-5, where 1 = little/no extent and 5 = great extent, to rate this item. Why did you select this rating?
- **Competing Initiatives:** To what extent do you think other state projects (i.e., competing initiatives) will impact the BEACON HR/Payroll transformation effort? Use a scale from 1-5, where 1 = little/no extent and 5 = great extent, to rate this item. Why did you select this rating?
- **People Enablement:** To what extent do you think state stakeholders understand their role in the BEACON HR/Payroll transformation effort (i.e., clear what their role will be and knowledge required). Use a scale from 1-5, where 1 = little/no extent and 5 = great extent, to rate this item. Why did you select this rating?
- **Communications:** To what extent do you think BEACON HR/Payroll communication efforts have provided state stakeholders with sufficient information? Use a scale from 1-5, where 1 = little/no extent and 5 = great extent, to rate this item. Why did you select this rating?

Appendix E: Other State Agency Activities & Competing Initiatives

Other State Agency Activities & Competing Initiatives

<i>Initiative/ Agency</i>	<i>Timeframe</i>	<i>Description</i>	<i>BEACON Project Impact</i>	<i>Potential Impact Level</i>
End of Fiscal Year Closeouts (All Agencies)	June – July (yearly)	Agencies will be closing out financials on June 30 th for the past fiscal year.	Present activities planned around this time period need to be avoided. A large percentage of agency resources working on the BEACON HR/Payroll Project will need to work on these closeouts.	High
Career Banding Initiative (OSP; Affects All Agencies)	By February 1, 2007 (for classes approved by State Personnel Commission)	Directed by OSP, this effort aims to consolidate over 6,000 job classifications into approximately 200 bands.	Classes approved by the State Personnel Commission on or before June 15, 2006 can be implemented as long as they are completed by February 1, 2007.	High
NC Legislative Sessions (All Agencies)	January – April June – July	During and after the NC State Legislative session, many agencies need to answer information requests from legislators.	The NC State Legislature usually convenes during the summer to approve various budget requests. Answering these requests takes up a lot of agency resource time.	High
Implementation of NCFast (DHHS)	Fall 2006	This is a project between the State and counties to automate many social service programs.	There is a core group of 60 employees (combination of State and local employees) working on the project.	Medium

Other State Agency Activities & Competing Initiatives (Cont'd)

<i>Initiative/ Agency</i>	<i>Timeframe</i>	<i>Description</i>	<i>BEACON Project Impact</i>	<i>Potential Impact Level</i>
Closing Two Hospitals and Opening One New Hospital (DHHS)	October 2007 – February 2008	Consolidating two older hospitals and moving most staff to newly built facility in Butner.	There are approximately 1,200 employees at each of the existing facilities; the staffing plan, which will include the number of employees for the new hospital, is still under development.	Medium
Implementation of MMIS (DHHS)	TBD	MMIS will be a new Medicaid Management Information System that replaces the current system with EDS.	The new system was supposed to be implemented in July 2006, but the project needs to be extended further. Implementation will be determined. The project consists of 50 State and contractor staff. This project, when implemented, will have a high impact on providers and users of Medicaid.	Low

Other State Agency Activities & Competing Initiatives (Cont'd)

<i>Initiative/ Agency</i>	<i>Timeframe</i>	<i>Description</i>	<i>BEACON Project Impact</i>	<i>Potential Impact Level</i>
PPO System Rollout (SHP)	May – September 2006	New health care insurance plan rolled out by the State Health Plan.	A large project that will utilize a lot of resource time. State Health Plan has a small staff (32 employees).	Low
HR System Implementation (DJJDP)	Summer 2006	DJJDP has recently completed information systems development work on a database that tracks employee qualifications and training. Another module of that database is a policy acknowledgement tracking system that takes downloads from PMIS.	This may or may not have a replacement in the BEACON HR/Payroll system. If it does not have a replacement, the only interface needed would be a data feed from the BEACON HR/Payroll system. This would replace the downloads DJJDP receives from PMIS.	Medium
ORBIT Project (NC State Treasurer)	Spring/Summer 2007	In 2007, active employees and employers will gain access to ORBIT, a web-based system that will provide virtually full access to employee retirement account information.	Active employees and employers will be affected by the change to the new system. A large number of people within the Office of the State Treasurer are involved with this effort.	High

Other State Agency Activities & Competing Initiatives (Cont'd)

<i>Initiative/ Agency</i>	<i>Timeframe</i>	<i>Description</i>	<i>BEACON Project Impact</i>	<i>Potential Impact Level</i>
NC Wise – Student Accounting System (DPI)	Current – 2010	NC Wise is a student information system that will service over 2,300 schools when fully implemented. This system will provide course information, grades, transcripts, etc. for the schools. Approximately 1/3 of the schools have gone live thus far.	Impact on the agency within payroll or HR should be low. The technical staff will be involved to a larger extent. Agency leadership is heavily involved with this project.	Medium
Tax Processing Season (DOR)	February – May (yearly)	There are approximately 500 persons involved in tax processing, with about one-half of that number being temporary employees hired just for that time of year.	The last two weeks of March and the last three weeks of April is the time that imposes the most demand on the personnel in the tax processing areas. HR and Payroll are busier that time of year as well, because of the need to get persons hired. Additionally, unlike how DOR pays their permanent employees, they pay temporary employees on a bi-weekly basis.	High

Appendix F: Potential Policy Impacts

Potential Policy Impacts Identified by Agency Leaders

Potential Policy Impacts	Supporting Comments
Decision-making Policies	Currently, many agencies have varying degrees of decision-making authority and autonomy. The BEACON HR/Payroll system may standardize roles and responsibilities that impact each agency's decision-making structure.
Time-keeping Policies	Currently, time-keeping is conducted separately by each agency in many different ways. Time-keeping within the new system will be standardized. Many agencies will need to learn the new time-keeping processes within the new system and the policies associated with it.
Hiring Policies	Currently, most agencies hire lower-level pay grade employees without much OSP interaction. However, OSP approves most higher-level hires. For smaller agencies, OSP handles all hiring. Under the BEACON HR/Payroll system, there will be a need for policies to standardize the hiring process.
Direct Deposit Policies	Currently, a large number of people receive their checks via hardcopy in the mail or in person. Under the BEACON HR/Payroll system, checks may be deposited directly in employees' bank accounts. A policy will need to be established to address direct deposits.

Appendix G: Identified Implementation Success and Risk Factors

Identified Implementation Success Factors

Success Factors	Agency Leadership Supporting Comments	BST Sponsor & Lead Supporting Comments	Agency SME Supporting Comments	BEACON HR/Payroll Project Team Leads Supporting Comments
PMIS Replacement	<p>"PMIS seems to be an archaic system for my employees to use."</p> <p>"My employees complain about the disparate systems they have to use now...especially PMIS. I assume the BEACON system will effectively replace PMIS."</p>	<p>"PMIS is not very flexible and does not provide for easy information tracking."</p> <p>"PMIS is terrible. Do what you can to replace this system."</p>	<p>"Get rid of this system! We need something that is easier to use and generates useful reports."</p> <p>"PMIS is not an easy system to use. Please ensure that the BEACON HR/Payroll system is easy to use."</p>	<p>"PMIS is an antiquated system. Many people within OSP and other state agencies are looking forward to using a system that can generate useful reports that help us better analyze data, including trends and forecasting information."</p>
Elimination of Duplicate Work Efforts	<p>"We need a system that eliminates redundant entries by numerous people."</p> <p>"The BEACON HR/Payroll system will save us money by eliminating processes that are duplicative in nature."</p>	<p>"The new system needs to eliminate the duplication of efforts by various people. The current system wastes valuable resource time."</p> <p>"We currently waste a lot of time conducting activities that are redundant."</p>	<p>"We need to eliminate duplication of efforts by our staff. No more filling out all the paper work all over again. No double entry!"</p>	<p>"BEACON should help reduce the amount of effort it takes to produce reports. This is currently a quality assurance issue. BEACON will change this for the better!"</p>

Identified Implementation Success Factors (Cont'd)

Success Factors	Agency Leadership Supporting Comments	BST Sponsor & Lead Supporting Comments	Agency SME Supporting Comments	BEACON HR/Payroll Project Team Leads Supporting Comments
Useful Management Reporting	<p>"Enhanced reporting will allow managers to better track labor resource items/issues better. We need better time reporting and performance management data."</p>	<p>"Better reporting is needed so agency management can track items and issues better."</p> <p>"Currently, we do not have all of our information in one place. When we are asked to develop reports for the Legislature or our agency leadership, it is hard to do."</p>	<p>"I want to run reports myself to understand what's going on within my agency. I don't want to request such reports from OSP."</p> <p>"I want to create ad hoc reports that I think are important. I also want to be able to look at the data in a readable format."</p>	<p>"Management reporting has been a nightmare for many of my colleagues in other agencies. They collect information in various places using numerous mechanisms. This is time consuming and can cause problems if the data is needed by agency leadership in a timely manner."</p>
Easy System Access and Usage	<p>"Employees will embrace the change and look of the BEACON HR/Payroll system if it feels natural to use."</p> <p>"Make sure the system is built in a way that people find the functionality to be inherently easy to use."</p>	<p>"The current systems are cumbersome to use. There are also many workarounds. It is very important that employees feel comfortable with the look and feel of the new system."</p>	<p>"It is important that we have a more user friendly system than the mainframe environment we currently use. We want a windows-based system."</p>	<p>"BEACON will allow users to access one system that contains all of the information they need to conduct their work more efficiently and effectively."</p>

Identified Implementation Success Factors (Cont'd)

Success Factors	Agency Leadership Supporting Comments	BST Sponsor & Lead Supporting Comments	Agency SME Supporting Comments	BEACON HR/Payroll Project Team Leads Supporting Comments
Provide “Just-in-Time” Training	<p>“It’s important to conduct just-in-time training; don’t train too early. Also make sure the training materials include information that is relevant to our daily work.”</p> <p>“With proper training, this project will be a big success. Make sure you don’t skimp on the training.”</p>	<p>“Offer just-in-time training to employees that is specific to their roles in the system. Relate training scenarios to their daily work.”</p> <p>“Training is very important. Make sure you also give people a chance to use the system before you go live with the new system.”</p>	<p>“Training should clearly show new roles and responsibilities in the BEACON HR/Payroll system. It should cover the various processes and what people should do in these situations.”</p>	<p>“If people do not feel comfortable with the system at go-live, we will be in big trouble. Make sure you have people trained on it and allow them to use the sandbox to practice before go-live.”</p>
Eliminate Manual Processes	<p>“We desperately need to automate existing functions within our agency. Currently, we have a dedicated person who hands out pay stubs to each person in our office each pay period.”</p>	<p>“We need to reduce the number of manual processes we currently have within our agency. Automation of certain functions will help us work on more important things.”</p>	<p>“Automation is key! This will help reduce errors and take away a lot of the mystery surrounding various business processes.”</p>	<p>“There are various manual HR processes that we identified during the first wave of design sessions that can be automated. Such automation will save agencies time and money.”</p>

Identified Implementation Success Factors (Cont'd)

Success Factors	Agency Leadership Supporting Comments	BST Sponsor & Lead Supporting Comments	Agency SME Supporting Comments	BEACON HR/Payroll Project Team Leads Supporting Comments
User Friendly & Additional Functionality	<p>"The system needs to support user needs."</p> <p>"Current systems are not user-friendly. We need a system that meets our needs and is scalable for future use."</p>	<p>"Flexibility in analyzing data and creating reports would be good. The current systems are very rigid and often times workarounds are needed."</p>	<p>"Give us something we do not currently have...do not just replace what we have with a different look and feel. Give us more functionality."</p>	<p>"A lot of people who attended the design sessions want to know more about what the system will look like. Many are optimistic that the BEACON system will be much easier to use."</p>
Agency Leadership Commitment	<p>"Leadership needs to support the project and help get the resources needed to make the BEACON Project a success. Robert has done a great job at getting us all on board."</p> <p>"A strong PMO and Steering Committee acting to address issues as they arise will help agency leadership tremendously."</p>	<p>"We can't do this unless our leadership is bought into it. We need their support to make things happen within our agencies."</p> <p>"Agency leaders have not yet communicated about the project. In the future, they will need to offer their visible support for BEACON and explain that it will positively change the way we conduct business."</p>	<p>"It is important that we get buy-in from the top (agency) executives. They need to support this project and communicate that to their own people. They also need to support their people's involvement in BEACON."</p>	<p>"We need to make sure that agency leadership shows visible support for this project. They need to 'walk the talk' by giving presentations to agency employees and supporting involvement of various staff with the BEACON Project."</p>

Identified Implementation Success Factors (Cont'd)

Success Factors	Agency Leadership Supporting Comments	BST Sponsor & Lead Supporting Comments	Agency SME Supporting Comments	BEACON HR/Payroll Project Team Leads Supporting Comments
Employee Self-Service (ESS)	"The access that Employee Self Service will offer my employees is great! They will be able to make their own changes in address, benefit information, etc."	<p>"Employees will be able to do things for themselves, not wait for HR to do it for them."</p> <p>"What a great idea! We need to make sure that everyone understands how to use it."</p>	<p>"ESS is a great idea. This will allow employees to update and fill out their own information."</p> <p>"Such a tool will allow HR staff to do other less administrative tasks."</p>	"ESS will empower employees to make decisions whenever they want. It will also free up time and enable HR staff to perform other value-added job tasks."
Standardized Statewide Policies & Procedures	"The new system should provide agencies with a single set of statewide policies and procedures everyone needs to follow. This will get everybody on the same page."	<p>"Make sure you develop standardized policies and procedures for HR and payroll that can be followed consistently across all agencies."</p> <p>"The policy considerations raised during the Design Sessions should be documented and reviewed to see what we can do to standardize our business practices."</p>	"Standardization of policies and processes needs to happen across the state agencies."	"With the formation of the SAC, we should be able to get standardized processes passed through more easily and approved by the PSC. We need to make sure the agency leadership supports such standardization efforts. This is of utmost importance."

Identified Implementation Risk Factors

<i>Risk Factors</i>	<i>Agency Leadership Supporting Comments</i>	<i>BST Sponsor & Lead Supporting Comments</i>	<i>Agency SME Focus Supporting Comments</i>	<i>BEACON HR/Payroll Project Team Leads Supporting Comments</i>
Ineffective Project Management	“Make sure the system is ready when you say it is. If not, tell us ahead of time. If you deliver anything less, you’ll damage the project’s credibility and our faith in it becoming a reality.”	“People won’t get paid if the new system has problems during rollout.” “Don’t set false expectations. We all want this project to succeed. Be honest with us about where we are with the project.”	“I think most agencies do not realize the scope and aggressive timeline for this project.”	“We need to make sure we keep this project on schedule. Everybody is watching to see if this project is going to come to fruition...the General Assembly, Governor’s Office, agency leadership and employees alike.”
Lack of Participation by Core Users	“Make sure the agencies are involved with this effort from the start. Get the users involved early and often.” “When end users are not involved with a systems project, the project ultimately fails. They need to be a part of the development for the new system. If so, they will ultimately buy into it.”	“A major risk is not having the right employees involved with the project. For example, not having the appropriate people participating in the Design Sessions.”	“We need to be involved in shaping the BEACON HR/Payroll system so that it meets our needs. If not, it won’t be our system and nobody will use it.” “People want to participate. Make sure the people not invited to the Wave 1 Design Sessions are included to some degree in the future.”	“Some of the agency SMEs that attended the Wave 1 Design Sessions were at the management level. Thus, they did not have the same level of understanding that their staff have in terms of system functionality. We need to be aware of this when we invite agency representatives to the Wave 2 Design Sessions.”

Identified Implementation Risk Factors (Cont'd)

Risk Factors	Agency Leadership Supporting Comments	BST Sponsor & Lead Supporting Comments	Agency SME Focus Supporting Comments	BEACON HR/Payroll Project Team Leads Supporting Comments
Lack of Standardization	"Trying to standardize practices across agencies will be very difficult. However, you need to do it....just do it right and get the buy-in from agency leadership."	"This project will fail if we do not have established policies and processes which everyone follows."	"Agencies really act under their own sets of rules. We need to change this with the new system. Some people won't like it, but it is important we get people on the same page."	"We need to get buy-in from agency leadership to support our efforts to standardize various processes. The SAC will review proposed process standardization items. Once approved by the PSC, agency leadership needs to support it visibly and communicate it to their employees."
Inadequate Training	"Increased training and knowledge, more communications and better understanding of the system will help people more easily accept and embrace the system."	<p>"If you don't invest in training that corresponds with our daily work, people will have a hard time learning the new system and won't accept it."</p> <p>"Make the training relevant to what we do on a daily basis. Make sure it is also agency-specific."</p>	"Do not offer insufficient training, such as training that is too cookie-cutter, not based on their jobs, too vanilla and simplistic. We want to be prepared for our jobs on day 1."	"We need to make sure the training is relevant to what people will be doing in the new system. We need to make sure people understand what their roles will be...no surprises!"

Identified Implementation Risk Factors (Cont'd)

Risk Factors	Agency Leadership Supporting Comments	BST Sponsor & Lead Supporting Comments	Agency SME Focus Supporting Comments	BEACON HR/Payroll Project Team Leads Supporting Comments
Difficulties Migrating Data	"We need to ensure the data is migrated into BEACON properly. The system will only be as good as the data that is put into it."	"Make sure that data is properly migrated into the new system. Bad data can cause operational problems (and financial losses) if not detected and fixed before rollout."	"We need to make sure all the data is in the new system and that it is correct."	"The technology team is working with the CIOs and BST Infrastructure/Readiness Leads to determine what issues need to be addressed. We will need to follow up periodically with the agencies to make sure we capture and address all potential risks."
Inadequate System Testing	<p>"An old system is bad, but a bad replacement system is worse. Test it before you deploy it."</p> <p>"Make sure you get the agencies involved with testing the new system. They are going to be using it so their input is extremely important. Without their buy-in, the rollout will go badly."</p>	"Not adequately testing the system before Go-Live can be devastating if it does not operate properly."	"Make sure you work with the agencies to test the system before going live. I like the idea of a phased implementation approach. Work out any problems with a smaller group of agencies first."	"The system needs to work at go-live, if it does not work then people will lose faith and support will wane quickly. People want to make sure they get paid!"

Identified Implementation Risk Factors (Cont'd)

<i>Risk Factors</i>	<i>Agency Leadership Supporting Comments</i>	<i>BST Sponsor & Lead Supporting Comments</i>	<i>Agency SME Focus Supporting Comments</i>	<i>BEACON HR/Payroll Project Team Leads Supporting Comments</i>
Ineffective Communication	“Agency staff do not know much about the BEACON HR/Payroll Project and how it fits into the overall statewide business transformation effort. We need to start communicating this information out to them.”	“Agency employees have a limited understanding of the BEACON HR/Payroll Project. Most of the communications about the project to date have been to agency leaders.”	“Agency staff have not been told much about the BEACON Project because our management has not been told much about it.” “You need to start talking about the benefits of the BEACON HR/Payroll system. Otherwise, people will form their own opinions...which are usually negative.”	“Right now most communication has been focused on agency leadership and the BST Sponsors/Leads. Now is the time to open up other lines of communication to the employees and core users. People are starting to talk about BEACON and are wondering how it will potentially effect them. This makes them nervous.”
Newly Elected Governor / Lack of Legislative Support	“If the Legislature perceives things are not going well, they can stop the project.” “Make sure you keep the Legislature informed of the project’s progress. Also make sure you maintain strong agency support.”	“The Legislature will watch the spending on this project. Furthermore, we have an election coming up...the new governor may have other ideas on how to spend IT money.”	“I wonder if when the new governor is elected the project will still be supported. You need the funds to continue with this project. Will it still be a priority?”	“The General Assembly is watching this project closely. They want to know if the investment made in funding this project will lead to cost savings in the future. We need to keep them abreast of project progress.”

Identified Implementation Risk Factors (Cont'd)

<i>Risk Factors</i>	<i>Agency Leadership Supporting Comments</i>	<i>BST Sponsor & Lead Supporting Comments</i>	<i>Agency SME Focus Supporting Comments</i>	<i>BEACON HR/Payroll Project Team Leads Supporting Comments</i>
Insufficient "Go-Live" Technical Support	"It is very important that you support agency staff when you roll out the new system. Help them feel comfortable using the system."	"You have to set up a support team that works to answer their questions. Training alone won't prepare them."	"Not all people will be prepared for day 1. Some people will be computer challenged." "Be prepared to hold people's hands after going live with the new system."	"Lessons learned from other projects suggests that many system implementation efforts fail when there is not adequate support after go-live. We need to make sure we have dedicated resources both within the project team and the agencies to support the system at implementation."
Lack of Leadership Support	"Make sure agency leadership is involved with the project; they need to support the changes that are going to take place."	"Lack of support from agency leadership will hurt the project – you need to help them understand the importance of this initiative." "Decision-making authority and accountability within our organization is not always clear to employees."	"Without leadership support, the project will not get off the ground." "Authority and accountability may be clear at the leadership level, but it is not as clear at management levels."	"Leadership has not taken or shown visible support for this project. They are taking a 'wait and see' approach to this effort. We need to get them to commit to this effort and facilitate support within their agencies. We need to develop a leadership action plan to help us facilitate this effort."

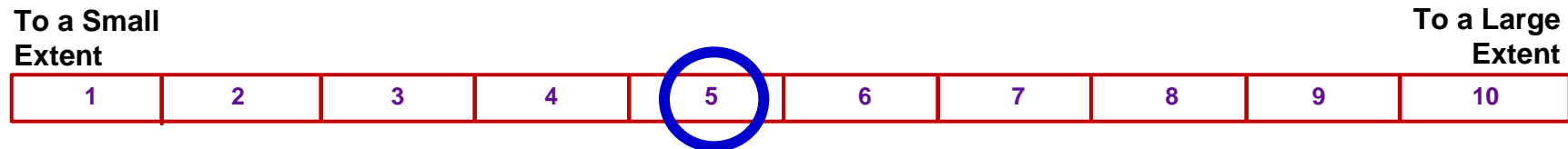
Identified Implementation Risk Factors (Cont'd)

Risk Factors	Agency Leadership Supporting Comments	BST Sponsor & Lead Supporting Comments	Agency SME Focus Supporting Comments	BEACON HR/Payroll Project Team Leads Supporting Comments
Conflict with Agency Work	"Balance the BEACON Project workload for agencies with their own day-to-day workload requirements."	"Be cognizant of a shortage of personnel to help out with this project due to concurrent projects within their own agencies and universities."	<p>"We have other projects within our own agencies that take up a lot of our time. How do we prioritize our time to meet these multiple needs?"</p> <p>"The BEACON HR/Payroll Project is leveraging a number of agency employees on a part-time basis. When push comes to shove, these resources will focus on their own activities and avoid working on BEACON HR/Payroll Project tasks."</p>	"Although we are working with ITS to coordinate our efforts, there are always some projects within the agencies that will fall beneath radar. We must continuously check with the agencies to see if there are any initiatives we need to be made aware of and we can determine the potential impact on this effort."
Fear of Job Loss	"There will be a focus on workforce transition as it relates to this project. Lots of clerical-level employees are going to be affected by the new system."	"Changes in jobs will be an issue ... including loss of jobs due to automation is a major risk."	"Many people will be afraid of change. Some will ask whether they will still have a job?"	"A lot of people are going to ask about job impacts once the future state processes are set. We will need to address this issue head on."

Appendix H: Communication Assessment Findings

Understanding Need For BEACON HR/Payroll Project

Agency leaders were asked to rate the extent to which employees at three levels (leadership, HR/Payroll personnel, and general staff) within their agencies understand the need for the BEACON HR/Payroll Project. The following rating is an average of their responses.



Reasons for the Rating:

- “Numerous communications about the project have been sent out to agency leadership, which is great. We are all onboard!”
- “Many employees are frustrated with existing systems and are ready for a change.”
- “Increased knowledge, more communication, and better understanding will help people gain better acceptance for the BEACON HR/Payroll system.”
- “People should be informed of and understand the benefits of the new system and the opportunities it provides for them.”
- “Leadership supports the BEACON Project. Now is the time to communicate about the project to the masses. Remember...you can’t communicate enough about this project.”

Communication Messages To Improve Project Awareness

<i>Suggested Messages</i>	<i>Agency Leadership Supporting Comments</i>	<i>BST Sponsor & Lead Supporting Comments</i>	<i>Agency SME Supporting Comments</i>	<i>BEACON HR/Payroll Project Team Leads Supporting Comments</i>
Provide Project Overview and Progress	<p>"Provide periodic updates on what is going on with the project."</p> <p>"Keeping people informed on how the project is progressing is very important!"</p>	<p>"Write up an email with a short synopsis (in bullet points) of current project activities."</p> <p>"Send a link via email to employees that connect them to the BEACON website for information updates."</p>	<p>"Employees don't know too much about BEACON right now. They need to be brought up to speed and then updated on progress made with the project."</p>	<p>"The communications toolkits we are presently creating should help get the message out to the appropriate audiences."</p>
Build Case for Change	<p>"You need to talk about how changes will effect everyone."</p> <p>"Leadership needs to make sure everyone knows this is going to happen. This is not a choice...make it a condition for continued employment."</p>	<p>"Explain why we are implementing a new HR/Payroll system and how it will affect the agencies."</p> <p>"People genuinely want this to happen...you just need to continue articulating it to them."</p>	<p>"Let everyone know EVERYONE WILL BE IMPACTED...so pay attention!"</p> <p>"Create specific messages tailored to specific people. Remember, people want to know how it will affect them."</p>	<p>"Employees currently have no clue how the BEACON HR/Payroll Project will benefit them. Now is the time to get the word out about the project and how it will affect them."</p>

Communication Messages To Improve Project Awareness (Cont'd)

<i>Suggested Messages</i>	<i>Agency Leadership Supporting Comments</i>	<i>BST Sponsor & Lead Supporting Comments</i>	<i>Agency SME Supporting Comments</i>	<i>BEACON HR/Payroll Project Team Leads Supporting Comments</i>
Describe Project Phases / Activities	"The timeline of activities by phase you used was very helpful. You should keep referencing it as we move forward with the project."	"It was very helpful for us to see the big picture for this project. You should let us know what we need to do to assist with this project by phase – like what you presented to us during the BST Lead meeting."	"Keep people informed of the activities associated with each phase of the project. Keep us updated on what we need to do to help make this a success."	"We are making efforts to let people know about where we are with the BEACON Project. We are now spending time to go through the project timeline during the BST Sponsor and Lead meetings."
Stress Standardization of Processes	<p>"Talk about how the new system addresses the need to standardize processes across all State agencies."</p> <p>"Standardized processes protects us from potential legal issues. This can't happen soon enough."</p>	"People need to understand the importance of standardization with this new system."	<p>"There will be some pushback with standardization. Many agencies feel that their way is the best way. Communicate the importance of standardized processes."</p> <p>"Standardization makes sense. Agencies all have their own set of rules. We need to all be operating from one set of rules."</p>	"Standardization is important and should be communicated by the PMO, Change/Communications Team, Functional Team, PSC, SAC, CMOC and other relevant parties to the agency leadership and employees. They need to understand why we are looking to standardize various process flows."

Communication Messages To Improve Project Awareness (Cont'd)

<i>Suggested Messages</i>	<i>Agency Leadership Supporting Comments</i>	<i>BST Sponsor & Lead Supporting Comments</i>	<i>Agency SME Supporting Comments</i>	<i>BEACON HR/Payroll Project Team Leads Supporting Comments</i>
Explain Benefits of New System	"Explain the benefits of the new system. Explain how the benefits exceed the costs. For example, time savings, paperwork reduction, ease of use, more efficient data collection and retrieval."	"We need to let people know why the new system is good for everyone. Explain how it will help us perform our jobs better and more easily than with our existing systems."	<p>"We need to know why this system is better than what we have now in our agencies. Is this system going to help us do our jobs better?"</p> <p>"You need to market the BEACON HR/Payroll system. People need to understand why we are going through this huge effort."</p>	"We will have to communicate the benefits over and over again. Right now, people will take it in, but it will take more time for it to sink in. Once it does, we will have to start answering questions pertaining to how it affects them."
Describe Employee Self Service (ESS) Concept and Functionality	"Market ESS early, market clearly and market simply to people. This will be a big change for people."	"Explain what ESS is and how it will affect employees. We do not know much about it. Also be aware that there are employees who never use computers that may have issues with this functionality."	<p>"Explain ESS and its functionality to people. Many are used to calling HR for their needs."</p> <p>"People will be nervous about giving up human access to answer their questions and help them with their problems. Clearly explain how the ESS will work."</p>	"Be prepared to tell people that this functionality will benefit people by allowing them to conduct their HR business whenever they want. We need to make sure we let people know that they will receive training to help them prepare for this change."

Communication Mechanisms To Deliver Messages

Communication Mechanisms	Agency Leadership Supporting Comments	BST Sponsor & Lead Supporting Comments	Agency SME Supporting Comments	BEACON HR/Payroll Project Team Leads Supporting Comments
Email	<p>"Email is widely used. It works. Just keep the messages simple."</p> <p>"Send a link via email to the BEACON HR/Payroll Project website that connects people directly to specific information updates."</p>	<p>"Write a short synopsis (i.e., bullet points) of current project updates in an email."</p> <p>"Provide a distinct title, such as 'BEACON Project' or 'BEACON HR/Payroll Project' in the subject line of emails so it is more easily found in email traffic."</p>	<p>"Email is one way to get the word out. However, it should not be the only way."</p> <p>"Emails get ignored...use creative subject lines."</p>	<p>Non comments on this area.</p>
Internet / Intranet	<p>"We have our own website that we can post BEACON HR/Payroll information on."</p> <p>"Work with our communications folks to get your information onto our intranet if you need to get the word out."</p>	<p>"This is a great vehicle to use to get the word out about the BEACON HR/Payroll Project. We also have a blog where we can get feedback on various initiatives we work on. You should think about using this vehicle as well."</p>	<p>"Email with links to the website were used when the health plan was rolled out. The website was a great source for people to gather information."</p> <p>"Put a spot on the website where people can ask questions."</p>	<p>"Once the website is established, this will provide the BSTs with tools and templates they can use to communicate project information out to their agencies."</p>

Communication Mechanisms To Deliver Messages (Cont'd)

Communication Mechanisms	Agency Leadership Supporting Comments	BST Sponsor & Lead Supporting Comments	Agency SME Supporting Comments	BEACON HR/Payroll Project Team Leads Supporting Comments
Memos	"Official memos from Robert [Powell] or the Steering Committee are good when major decisions are made."	"Memos can be a good way to broadcast decisions concerning the project. Be sure to communicate such decisions via other channels as well."	"Memos can be a useful tool to communicate official actions concerning the BEACON initiative. Make sure agency leadership follows up with their support for these project actions."	Non comments on this area.
Meetings	"Agency-wide meetings, as well as selected meetings with managers and leadership is helpful. Focus on keeping people informed and building buy-in for the project."	<p>"Use the BSTs to help advertise the BEACON HR/Payroll project. The Communications Agent can help with you with this effort."</p> <p>"PowerPoint presentations are a good way to brief agencies on what is going on. The BST meetings are a great example of communicating project progress."</p>	<p>"Meetings are a good way to make people aware of the project."</p> <p>"The BEACON HR/Payroll Project Team should brief the agency leadership and managers on the project and upcoming milestones."</p>	"You can't communicate enough. We need to prepare the BST Sponsors, Leads and Communications Agents with the right messages to convey to their agencies. We also need to inform agency leadership about the BEACON Project and solicit their participation in communicating messages about the project to agency employees."

Communication Mechanisms To Deliver Messages (Cont'd)

Communication Mechanisms	Agency Leadership Supporting Comments	BST Sponsor & Lead Supporting Comments	Agency SME Supporting Comments	BEACON HR/Payroll Project Team Leads Supporting Comments
Newsletters	<p>"Both hardcopy and electronic newsletters work well. I like reading about what is going on and who the members of the team are. It puts a face on the project."</p>	<p>"Send out periodic newsletters. People read them."</p> <p>"Send out newsletters via agency channels."</p>	<p>"Electronic newsletters are good."</p> <p>"Make sure the website is updated often and you keep people informed of the project's progress. A lot of people are waiting to see what happens."</p>	<p>"Every agency must have a newsletter. We need to take advantage of this to communicate information out about the BEACON Project."</p>
Payroll Inserts	<p>"One way to communicate what is going on with BEACON is to advertise information on people's pay stubs."</p> <p>"I believe information has been communicated on pay stubs in the past. That is a great way to get the word out about BEACON."</p>	<p>"Advertise project on checks distributed to State employees."</p> <p>"Payroll stubs work. Everyone reads those!"</p>	<p>"Put information in with the pay stubs. People won't miss it then."</p> <p>"Using payroll stubs is a creative way to advertise any news about the BEACON HR/Payroll Project with the masses."</p>	<p>"Send messages about the BEACON HR/Payroll Project via payroll inserts is a good idea. However, it takes a lot of coordination internally to make this happen. Definitely plan ahead. Also, it is probably wise to do this closer to go-live."</p>

Communication Mechanisms To Deliver Messages (Cont'd)

Communication Mechanisms	Agency Leadership Supporting Comments	BST Sponsor & Lead Supporting Comments	Agency SME Supporting Comments	BEACON HR/Payroll Project Team Leads Supporting Comments
Marketing Materials	<p>"You can't communicate about this project enough. You should use promotional kits at go-live which include quick reference cards, granola bars, water, and a stress ball with the help desk number on it."</p> <p>"Whatever you do...make sure you include agency leadership and the BSTs to help market the project. They are your eyes and ears within the agencies. Keep them involved and they will market for you."</p>	<p>"Pamphlets, toys with the BEACON logo, and other promotional products would be good to give out to people."</p> <p>"You have to get the word out on BEACON now. Use some creative vehicles...make sure you explain why it is important that we are taking on this initiative."</p>	<p>"Create specific messages that target various groups like agency leaders, mid-level managers, clerks, etc."</p> <p>"People are going to start asking more questions about BEACON. Advertise the project, but make sure people benefit from them."</p> <p>"Have a communications agent at each agency that is responsible for spreading information."</p> <p>"Whatever the vehicle is...the message has to be tailored to make it specific to the audience."</p>	<p>"The Communications Toolkits that the Communications Team is pulling together should help the BSTs in sending out the appropriate messages about the BEACON Project at the right times."</p>

Appendix I: Lessons Learned from Past Agency Projects

Lessons Learned From Past State Projects

<i>Lessons Learned</i>	<i>Agency Leadership Supporting Comments</i>	<i>BST Sponsor & Lead Supporting Comments</i>	<i>Agency SME Supporting Comments</i>	<i>BEACON HR/Payroll Project Team Leads Supporting Comments</i>
Manage Agency Expectations	<p>"Timeframes have to be realistic. The project schedule seems to be aggressive."</p> <p>"Don't overshoot the scope of the project. Do only what you can manage to accomplish."</p> <p>"Establish business operating principles that everyone agrees with and use them when agencies start questioning new policies and procedures. Come back to established business operating principles to validate changes in processes / activities."</p>	<p>"Be sure you set realistic deadlines. People lose faith after rollout dates keep getting pushed back."</p> <p>"Set expectations. Don't oversell and under-deliver."</p>	<p>"Good project management is important. Let people know if the project is behind schedule."</p> <p>"Be prepared that you won't please all of the people all of the time."</p>	<p>"We all need to make sure we are communicating the same messages to the agencies. Furthermore, we need to make sure that we manage the expectations of the various stakeholder groups. We can utilize the BSTs to help us manage these expectations within the agencies."</p>

Lessons Learned From Past State Projects (Cont'd)

Lessons Learned	Agency Leadership Supporting Comments	BST Sponsor & Lead Supporting Comments	Agency SME Supporting Comments	BEACON HR/Payroll Project Team Leads Supporting Comments
Offer Effective Training and Support	<p>"Don't conduct training too early. Just-in-time training is good. We have experienced problems with such training schedules in the past."</p> <p>"You need to make sure support is offered to those people who need it once you go live with the new system. Many of these people will be nervous about the changes."</p> <p>"Training delivery in the past has been weak. Training is often conducted too early or not coordinated well."</p>	<p>"Offer just in time training to employees that is specific to their roles in the system. For example, relate training examples to their daily work."</p> <p>"Training should be conducted by both state and contractor staff. We need to make sure the new processes are explained with a link to agency-specific tasks."</p> <p>"Offer ongoing support to agencies. Make sure you have the resources to do it right."</p>	<p>"Training should not be too broad. It needs to be grouped by positions/roles."</p> <p>"Trainers don't understand the processes of the agencies. We had to train the trainers during the sessions. You have to understand how the State does things, not just SAP."</p> <p>"Be aware that you will have to deal with different educational levels when training. People will have different levels of understanding. Offer support to these people after going live. Don't leave them stranded."</p>	<p>"Training is critical to ensuring user acceptance of BEACON. Train people using concrete examples related to their actual work...make the training NC-specific. No cookie-cutter systems training. Also, make sure you train them just before we go live with the new system. We don't want people to forget what they learned."</p>

Lessons Learned From Past State Projects (Cont'd)

Lessons Learned	Agency Leadership Supporting Comments	BST Sponsor & Lead Supporting Comments	Agency SME Supporting Comments	BEACON HR/Payroll Project Team Leads Supporting Comments
Provide Appropriate State Resources	<p>"Don't rely too heavily on the contractors for implementation. It is an ownership issue for the State, not the contractor."</p> <p>"With past unsuccessful IT project implementations, users were not involved too much. We need to be a part of this process for this implementation to be successful."</p>	<p>"Make sure you identify the right stakeholders and their role on the project. One project did not identify and involve the right stakeholders and it was a disaster upon Go-Live."</p>	<p>"You need to keep agency employees involved with the project so they are aware of the system and feel comfortable with the changes that are taking place."</p> <p>"Agency leadership should dedicate the necessary staff to help with the project. We need them to allow us to shift responsibilities to others so we can work with you."</p>	<p>"Our main concern right now is making sure we get the right people to attend the Wave 2 Design Sessions. We need agency input on the current and future state process flows so we can gain acceptance."</p>
Maintain Strong Leadership Support	<p>"Engage leadership at each agency to carry the mantra. Eliminate mixed messages."</p> <p>"Make sure we have a strong Steering Committee to keep things on track."</p>	<p>"Some people will be resistant to change so we should have strategies to mitigate identified risks within the agencies. Agency leadership should be driving this strategy."</p>	<p>"Get leaders involved in testing and process planning so that they want to share messages with their agencies."</p>	<p>"Keep leadership informed and hold them accountable for communicating about the BEACON Project within their respective agencies."</p>

Lessons Learned From Past State Projects (Cont'd)

<i>Lessons Learned</i>	<i>Agency Leadership Supporting Comments</i>	<i>BST Sponsor & Lead Supporting Comments</i>	<i>Agency SME Supporting Comments</i>	<i>BEACON HR/Payroll Project Team Leads Supporting Comments</i>
Provide Consistent & Effective Communications	<p>"Start early on communicating how existing functions will be done. Make decisions visible and then press forward."</p> <p>"Communicate, communicate, communicate...you can't over-communicate with everyone about the project."</p> <p>"Keep the message consistent. Especially to agency heads and the Legislature. Try to keep this non-political."</p>	<p>"Establish and maintain proper communications throughout the enterprise and within each agency."</p> <p>"Remember to communicate about the project to everyone in language that is easy to understand."</p> <p>"Communicate business process changes as early as possible."</p> <p>"It is important to articulate the functionality of the BEACON HR/Payroll system in language others can understand."</p>	<p>"Communications does not get shared with people who need it."</p> <p>"People ignore messages that aren't tailored to them."</p> <p>"Market BEACON! We need change agents in HR to market this project."</p> <p>"Have communications that are not too large and easy to understand what the point is. Don't overwhelm them with long messages that don't make sense to them."</p>	<p>"You can't communicate enough. We are on the right track. The Communications Toolkit will help us maintain control over what communications are being sent to agency employees."</p>

Lessons Learned From Past State Projects (Cont'd)

<i>Lessons Learned</i>	<i>Agency Leadership Supporting Comments</i>	<i>BST Sponsor & Lead Supporting Comments</i>	<i>Agency SME Supporting Comments</i>	<i>BEACON HR/Payroll Project Team Leads Supporting Comments</i>
Standardize HR & Payroll Policies / Procedures	"With other projects we have been involved with in the past, standardization is always circumvented for customization of processes that are deemed 'special' by agency leadership. We need to hold the line with this project and persuade agency leadership that standardization is good."	"Lack of standardization is going to be hard to overcome, but we need it desperately."	"We need to have a place to go for set rules. Rules that are set in stone eliminate any confusion on the CORRECT answer."	"Standardization is a tough task, but it's needed. We set up the Standardization Advisory Committee which should help us push this effort. We need the Program Steering Committee to drive support by agency leadership as well."